

North Carolina COVID-19 Vaccine Management System (CVMS)

CVMS Provider Portal

Vaccine Administration User Guide

Version 10

May 6, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

You can also call the COVID-19 Vaccine Provider Help Center at (877) 873-6247 and select option 1. The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021

3. You will receive an e-mail with your username and temporary password to log into the portal

Table of Contents

	Pages
Overview	4 - 7
Confirm Location of Operations <i>(only for Users associated to multiple locations)</i>	8 - 12
Enter Vaccine Administration Record	13 - 23
Edit Vaccine Administration Records After Submission	24 - 39
Edit Vaccine Administration Details	25 - 33
Edit Vaccine Administration Recipient	34 - 39
Post-Vaccine Administration Reminders	40 - 41
Appendix	42 - 44

If you are a Provider using the scheduling feature in CVMS, please refer to the [Addendum for Scheduling Feature at Point of Care and Vaccine Administration User Guide](#) for additional information on how to book and cancel first and second dose appointments.

Overview

Overview

The screenshot shows the NCDHHS CVMS Provider Portal. At the top, there's a dark blue header with the NCDHHS logo and 'CVMS Provider Portal' text. Below this is a navigation bar with links: Home, Recipient, Appointments, Slot Management, and Help & Information. The main content area indicates the user is logged in as 'Clinic Location1' and provides a 'Switch Locations' button. There are three main sections: 'Recipient Check-In' with a form for entering an appointment confirmation number and a 'Go' button; 'Today's Appointments' which displays a table of current appointments; and 'Appointment Walk-In' with instructions on how to search for individuals by name, date of birth, and email.

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1

Administering the COVID-19 vaccine typically involves:

1. Confirming recipient's consent to receive the COVID-19 vaccine
2. Recording the Vaccine Administration details
3. Understanding post-Vaccine Administration reminders

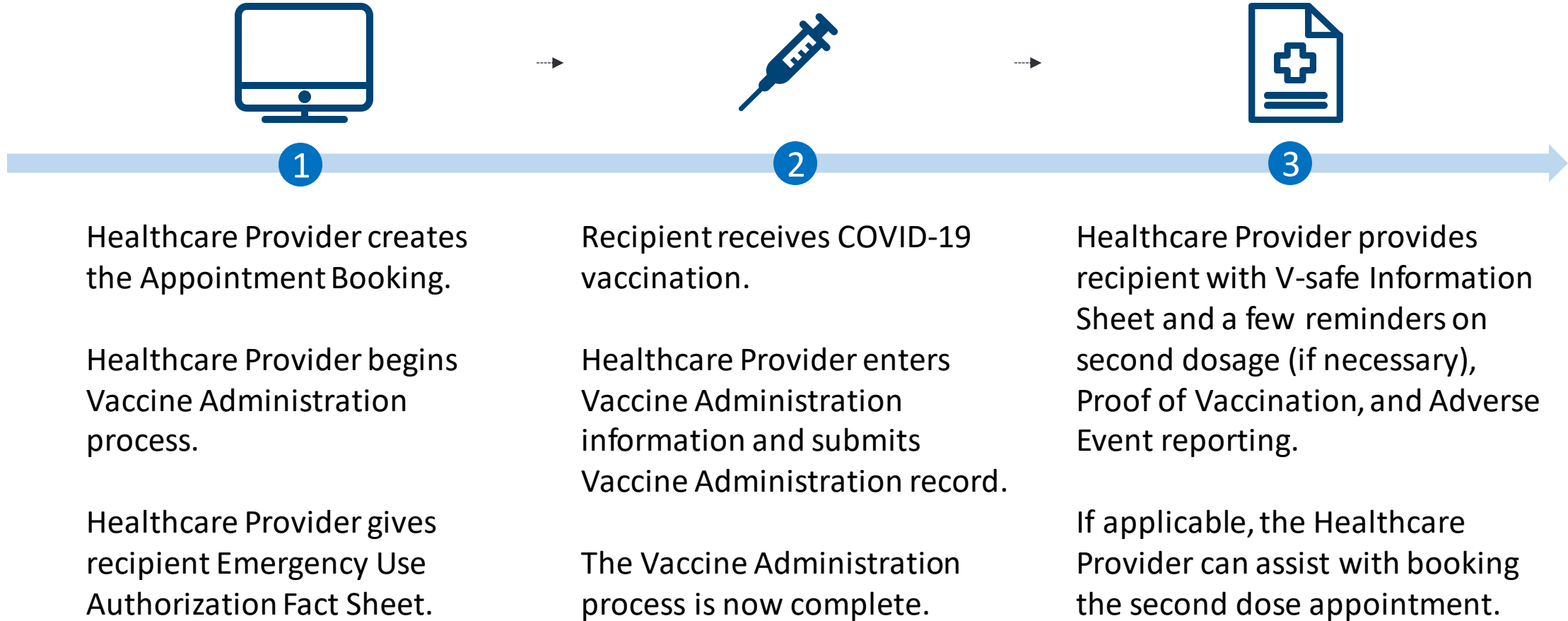
The processes included in this training are for the **Healthcare Provider, Healthcare Location Manager, and Statewide Location Manager** profiles.

You will also need to:

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers (Internet Explorer or Edge non-Chromium browsers are not supported)
- Log into the CVMS Provider portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> using your NCID username and password.

Now, let's get started!

Vaccine Administration Process



Key Terms

EUA Fact Sheet

Under section 564 of the Federal Food, Drug, and Cosmetic Act, the FDA Commissioner may allow unapproved medical products or unapproved uses of approved medical products to be used in an emergency to diagnose, treat, or prevent serious or life-threatening diseases or conditions caused by CBRN threat agents when there are no adequate, approved, and available alternatives. This is known as Emergency Use Authorization.


Confirm Location of Operations

(only for Users associated to multiple locations)

Step 1 of 4: Verify Location for Operations

Before you begin logging **VACCINE ADMINISTRATION** details, you will need to verify which location you are operating from.

The current location you are operating from is displayed at the top left of the screen. If the location is correct, no further action is required.



Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Crimson Skies - Location 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager


Tips

To learn more about getting access to other locations, speak to your location's **HEALTHCARE LOCATION MANAGER** in charge of setting up user accounts.

Step 2 of 4: Begin Switching Locations

If the location needs to be changed (e.g., you are operating in a different clinic location than the one currently displayed), continue following the instructions in this section.

- 1. Select the **SWITCH LOCATIONS** button
- 2. A pop-up window will appear asking you to select the location you would like to be operating in



Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Crimson Skies

Switch Locations

Recipient Check-In

You can check in a recipient by entering their Appointment Confirmation Number

No Appointment Confirmation Number

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Select the location to proceed:

Location Name	Street	City	State	Country	Postal Code
<input type="radio"/> Crimson Skies - Location 1	123 Test Dr null	Raleigh	North Carolina	USA	27609
<input type="radio"/> Crimson Skies - Location 3				USA	
<input type="radio"/> Crimson Skies - Location 2	null null			USA	

LOCATION
Clinic Location1

SubmitClose

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 3 of 4: Submit New Location To Operate In

- 1. Select the location that you would like to operate in
- 2. Verify that the address matches the desired location
- 3. Click **SUBMIT**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

To see a list of locations you have access to operate in / can search for, speak to your location’s **HEALTHCARE LOCATION MANAGER** or your location’s **VACCINE COORDINATOR**.

Select the location to proceed:


Location Na... ▾	Street ▾	City ▾	State ▾	Country ▾	Postal Code ▾
<input type="radio"/> Crimson Skies - Location 1	123 Test Dr null	Raleigh	North Carolina	USA	27609
<input checked="" type="radio"/> Crimson Skies - Location 3				USA	
<input type="radio"/> Crimson Skies - Location 2	null null			USA	

Submit

Close

Step 4 of 4: Confirm Successful Location Switch

Verify that the location successfully switched by checking the display at the top left of the Home Tab.



Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Crimson Skies - Location 3

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Enter Vaccine Administration Record

Step 1 of 10: Begin Vaccine Administration

There are three methods to begin the **VACCINE ADMINISTRATION** process.

When a **RECIPIENT** walks in to receive their COVID-19 vaccine and they do not have a scheduled appointment, the provider who initially verifies their identity will create an Appointment Booking for the recipient.


The provider who will administer the COVID-19 vaccine will select the recipient under **TODAY'S APPOINTMENTS** on the **HOME PAGE** which will begin the **VACCINE ADMINISTRATION** process.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

To review how to check-in a recipient through the Appointment Walk-In tool, review the **CVMS PROVIDER PORTAL RECIPIENT POINT OF CARE User Guide** at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#).



HomeRecipientAppointmentsHelp & Information

You are currently logged in as Clinic Org1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Apr 15, 21, 09:39 AM	VaccineAdmin Test Dose 1 Scheduled	03530452	Clinic Org1
Apr 15, 21, 07:10 AM	aaaa aaaaaa aaaaaa Dose 2 Scheduled	03530435	Clinic Org1
Apr 15, 21, 07:08 AM	AA BB CC Dose 2 Scheduled	03530433	Clinic Org1
Apr 15, 21, 07:01 AM	Sanjana Joy Dose 2 Scheduled	03530432	Clinic Org1
Apr 15, 21, 07:00 AM	Mod Man Dose 2 Scheduled	03530430	Clinic Org1

View all


Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Step 2 of 10: Begin Vaccine Administration

Alternatively, if you are a provider that has signed up for the scheduling feature in CVMS, you can begin the **VACCINE ADMINISTRATION PROCESS** by entering the recipient's **APPOINTMENT CONFIRMATION NUMBER** that they received after scheduling their appointment online using the scheduling feature in CVMS.

- 1. Enter the **APPOINTMENT CONFIRMATION NUMBER** for the recipient
- 2. Click **GO**



[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

You are currently logged in as Clinic Org1

[Switch Locations](#)

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

[Go](#)

No Appointment Confirmation Number?

[Search Appointments](#)

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Apr 15, 21, 09:39 AM	VaccineAdmin Test Dose 1 Scheduled	03530452	Clinic Org1
Apr 15, 21, 07:10 AM	aaaa aaaaaa aaaaaa Dose 2 Scheduled	03530435	Clinic Org1
Apr 15, 21, 07:08 AM	AA BB CC Dose 2 Scheduled	03530433	Clinic Org1
Apr 15, 21, 07:01 AM	Sanjana Joy Dose 2 Scheduled	03530432	Clinic Org1
Apr 15, 21, 07:00 AM	Mod Man Dose 2 Scheduled	03530430	Clinic Org1

[View all](#)

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

For information on how sign up for the scheduling feature in CVMS, please refer to the **Manage Appointment Scheduling User Guide** at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#).

Step 3 of 10: Begin Vaccine Administration

Lastly, for those providers with access to the scheduling feature in CVMS, the **VACCINE ADMINISTRATION** process can also begin from the **APPOINTMENTS TAB**.

- 1. Navigate to the **APPOINTMENTS TAB**
- 2. Find the **CORRECT APPOINTMENT BOOKING** for the recipient you would like to begin the Vaccine Administration for
- 3. Click the drop-down arrow to the right of their name
- 4. Select **CHECK IN** to begin **VACCINE ADMINISTRATION**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

For information on how sign up for the scheduling feature in CVMS, please refer to the **Manage Appointment Scheduling User Guide** at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#).

Home

Recipient

Appointments

Help & Information

You are currently logged in as County General Hospital - Chicago ER

Appointments

All Appointments

20 items

Cancel Appointment

Search Appointments

Search Confirmation Number

From

To

Status

Search by Name, Location, Vaccine Status

2021-03-09

New

Search

Reset

<input type="checkbox"/>	Case	Confirmation...	Date	Time	Recipient Na...	DOB	Location	Vaccine Status	Status	
<input type="checkbox"/>	03113939	gcdspjfp9n.1	Mar 9, 2021	8:00:00 AM	Wonder Woman	1940-05-05	County General H...	Dose 1 Scheduled	New	<div></div>
<input type="checkbox"/>	03113941	k6nxju95p.1	Mar 9, 2021	9:00:00 AM	NWW	1980-01-01	County General H...	Dose 1 Scheduled	New	Check In
<input type="checkbox"/>	03113973	njt65uisi7.1	Mar 9, 2021	12:00:00 PM	Thomas Reece Fl...	1991-03-10	County General H...	Dose 1 Scheduled	New	Book Second Dose

Step 4 of 10: Receive Verbal Consent

Beginning the **VACCINE ADMINISTRATION** process takes you to the **PATIENT VERIFICATION & SCREENING** page.

1. Review the recipient's health information on the right-hand side of the screen and click **NEXT**
2. On the **VACCINE CONSENT AND MEDICAL HISTORY** page, read the **DISCLOSURE STATEMENT** to the recipient
3. After you **RECEIVE VERBAL CONSENT**, you can **CHECK** the check box indicating that consent was provided and click **NEXT**

*Note: The recipient's **MEDICAL HISTORY** will be displayed on the right-hand side of the screen throughout the entire Vaccine Administration Process.*

Audience

**Healthcare
Provider**

Healthcare Location Manager

Statewide Location Manager

</

Step 5 of 10: Provide the EUA Fact Sheet

Before you administer the COVID-19 vaccine, you must also **PROVIDE** the **EMERGENCY USE AUTHORIZATION (EUA) FACT SHEET** and the **V-SAFE INFORMATION SHEET** to the recipient or guardian.

1. Obtain copies of the EUA Fact Sheet at this website (There will be different EUAs for different vaccines): <https://www.fda.gov/media/144414/download> (Pfizer EUA)
2. Obtain copies of the V-safe Information Sheet at this website: https://immunize.nc.gov/providers/ncip/pdf/v_safe_poster_508.pdf
3. Provide the recipient or guardian with the EUA Fact Sheet prior to vaccination.
4. Ask the recipient if they have any questions about the risks and benefits of receiving the COVID-19 vaccine.
5. Counsel the recipient on the importance of enrolling in V-safe to report any adverse events following vaccination.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Step 6 of 10: Review the Vaccine Administration Details

Once you receive the recipient's consent and provide them with the appropriate EUA Fact Sheet, you will continue to the **VACCINE ADMINISTRATION** page. This page is where you will **CAPTURE KEY INFORMATION** about the **COVID-19 VACCINE ADMINISTERED**.

NCDHHS
CVMS Provider Portal

HomeRecipientAppointmentsHelp & Information

Vaccine Administration

Vaccination Details

* Injection Site

Left Deltoid

* Dose

First DoseSecond Dose

* Route

Intramuscular (IM)Subcutaneous (SQ)Intradermal (ID)

* Date and Time of Vaccination
DateTime

Jan 13, 20212:18 PM

On Behalf of (Clinician)
-- Select Vaccine Administrator --

123Enter vialClear

Medical History
VaccineAdmin Test
DOB: Dec 12, 1933
Age: 87

Gender
Male

* Vaccine Product

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

* Manufacturer

Pfizer-BioNtech

* Available Vaccine Inventory

Expiration 1/13/2021 8:30 (Exp. Date: 1/13/2021) (Lot No: 100)

Lot Number
100

Serial Number
100

NDC
59267-1000-02

Expiration Date
Jan 13, 2021

Notes

No notes to report.

Previous

Email Address

Phone Number

Preferred Communication Channel
None

Next

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

Audience

**Healthcare
Provider**

Healthcare Location Manager

Statewide Location Manager

Step 7 of 10: Vaccine Administration Details for the Second Vaccine Dose

Vaccine Administration

Dose 1 Details

Date and Time

12/17/2020, 02:58 PM EST

Administered By

RegressionTest HCP

On Behalf of (Clinician)

RegressionTest HCP

Location

RegressionTest Loc 12

Vaccine Inventory

RegTest3 Delivery 12/16/2020

Vaccine Product

Pfizer-BioNTech (25 MDV) COVID-19 Vaccine

Lot Number

Lot999999

Medical

Callen R

DOB: De

Age: 25

Gender

Male

Race

Asian

Ethnicity

Not Hisp

Health C

None

Covid-19

No

Critical /

Yes

If your recipient has already **RECEIVED A FIRST DOSE** of the COVID-19 vaccine, you will see **FIRST DOSE DETAILS** at the top of the **VACCINE ADMINISTRATION PAGE**.

Dose 1 Details will include:

- Date and Time
- Administered By
- On Behalf Of (Clinician)
- Location
- Vaccine Inventory
- Vaccine Product
- Lot Number

Alternately, if a recipient received a first dose outside of CVMS (e.g., out of state, through a Long-Term Care facility), the **FIRST DOSE DETAILS** will not appear. You may still mark the dose as a **SECOND DOSE**. In that instance, a warning label will appear at the top of the screen prompting you to verify that the recipient has received a first dose.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips


Verify if a prior dose was given to the recipient.

Selecting **SECOND DOSE** will put the recipient into **DOSE 2 ADMINISTERED** status.

Warning

Please verify the recipient has received their first dose before choosing Second Dose.

Step 8 of 10: Enter Vaccine Administration Details



HomeRecipientAppointmentsHelp & Information

Vaccine Admin

Vaccination Details

* Injection Site

Left Deltoid

* Dose

First DoseSecond Dose

* Route

Intramuscular (IM)Subcutaneous (SQ)Intradermal (ID)

* Date and Time of Vaccination

Date

Jan 13, 2021

Time

2:18 PM

On Behalf of (Clinician)

-- Select Vaccine Administrator --

123

Enter vialClear

On the **VACCINE ADMINISTRATION** page, you will capture all **VACCINE DETAILS**.

1. Populate all **REQUIRED** vaccination details

- Injection Site
- Dose
- Route
- Date & Time of Vaccination (This field will default to the current date and time, but can be edited to record a vaccine administered in the past)

Note: The field **ON BEHALF OF (CLINICIAN)** allows you to enter information on behalf of another clinician who administered the COVID-19 vaccine.

Audience

Healthcare Provider


Healthcare Location Manager

Statewide Location Manager

Tips

Use the drop-down for the **ON BEHALF OF (CLINICIAN)** field and type the first letter of the clinician’s name.

If the individual completing the form is the person who administered the vaccine, **DO NOT ENTER** anything in the **ON BEHALF OF (CLINICIAN)** field.



NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

21

Step 9 of 10: Enter Vaccine Administration Details

* Vaccine Product

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

* Manufacturer

Pfizer-BioNtech

* Available Vaccine Inventory

Expiration 1/13/2021 8:30 (Exp. Date: 1/13/2021) (Lot No: 100)

Lot Number

100

Serial Number

100

NDC

59267-1000-02

Expiration Date

Jan 13, 2021

Notes

No notes to report.

Previous

1. Continue populating all **REQUIRED** vaccination details

- Vaccine Product (Vaccine Type)
- Available Vaccine Inventory (what lot?)

Note: If you select a **SINGLE-DOSE** vaccine product, you must select **FIRST DOSE**, otherwise you will receive an error.

2. Enter any additional notes that are relevant in the **NOTES** text field

3. REVIEW ALL VACCINE DETAILS

4. Click **NEXT**

*If you are administering a second COVID-19 vaccine dose, please be sure to confirm the COVID-19 vaccine is from the **SAME MANUFACTURER** as the first COVID-19 vaccine dose.*

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips

MANUFACTURER, LOT NUMBER, SERIAL NUMBER, NDC NUMBER and EXPIRATION DATE will AUTO POPULATE once you select the Product and Available Vaccine Inventory.

Step 10 of 10: Finish an Appointment

If you have administered a **SINGLE-DOSE** product of this is a second dose appointment, you will be routed back to the **HOME PAGE**.

If you have administered the first dose of a **TWO-DOSE** product, you will be routed to the **SCHEDULE FOLLOW-UP** page. This page will remind you to tell the recipient to schedule their second dose appointment. You can click **FINISH APPOINTMENT** to close the appointment and bring up the **HOME PAGE**.

*If the recipient used the scheduling feature in CVMS to book their first appointment, you will see a button labeled **BOOK SECOND DOSE** on this page. See the **SCHEDULE A SECOND DOSE APPOINTMENT** section for more details on that process.*

Audience

Healthcare
Provider

Healthcare
Location Manager

Schedule Follow Up

Second Dose Disclaimer

The COVID-19 vaccine requires a booster dose 21 days after your initial dose.

Schedule Follow Up

Second Dose Disclaimer

The COVID-19 vaccine requires a booster dose 21 days after your initial dose.

Schedule Second Dose Appointment

Schedule second dose appointment for confirmation number: r5r9naxiek.

Book Second Dose

Medical History

Wonder Woman

DOB: May 5, 1940

Age: 80

Gender

Other

Race

Other

Ethnicity

Unknown


Edit Vaccine Administration Records After Submission

Edit Vaccine Administration Details

Step 1 of 8: Navigate to Appointments Tab

If a **RECIPIENT** has incorrect details entered during Vaccine Administration, the Healthcare Provider **MUST EDIT** the details to ensure data accuracy.

To begin, navigate to the **APPOINTMENTS** tab.



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Healthcare Providers can only update Vaccine Administration details for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.

Step 2 of 8: Locate Recipient

Clicking on the Appointments tab takes you to a list view of all Appointments for your location.
Verify that you are currently logged in to the same location that the recipient received their vaccine.



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Org1

Appointments

All Appointments

0 items

Search Appointments

Search by Name, Location, Vaccine Status

Search Case/Confirmation Number

From

2021-04-15

To

Status

--- None ---

Search

Reset

Case

Confirmation ...

Date

Time

Recipient Name

DOB

Location

Cancellation ...

Vaccine Status

Status

← Previous

Page 1 out of

Next →

Audience


Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

The **APPOINTMENTS** tab will default to show you appointments that were scheduled for the same day you are logged in.



NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

27

Step 3 of 8: Select Appointment to be Updated

To begin editing the details of the **VACCINE ADMINISTRATION**, you must first locate the correct **APPOINTMENT RECORD**.


- 1. Enter the name of the recipient in the Search field, and adjust the date range to capture the date of the appointment that needs updating
- 2. Click **SEARCH**
- 3. Click the **CORRECT APPOINTMENT RECORD** for the recipient. The correct record will be the one that shows a **VACCINE STATUS** as either **DOSE 1 ADMINISTERED** or **DOSE 2 ADMINISTERED**

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Alternatively, you may search for the recipient via the **RECIPIENT TAB**, locate their recipient record, and click on their Appointment record.



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Org1

Appointments

All Appointments

1 items

Search Appointments

VaccineAdmin Test

Search Case/Confirmation Number

From

2021-04-15

To

Status

--- None ---

Search

Reset

1 records found.

<input type="checkbox"/>	Case	Confirmation ...	Date	Time	Recipient Name	DOB	Location	Cancellation ...	Vaccine Status	Status
<input type="checkbox"/>	03530452		Apr 15, 2021	9:39:13 AM	VaccineAdmin Test	1955-04-15			Dose 1 Scheduled	New

← Previous

Page 1 out of 1


Next →

Step 4 of 8: Review Vaccine Administration Details

The **VACCINE ADMINISTRATION** details will display for the recipient.

1. All Vaccination details are visible including:
 - Date and Time
 - Vaccine Product / Inventory
 - Injection Site
 - Route
 - Administered By
 - On Behalf of (Clinician)
 - Notes

2. To begin editing the details of the **VACCINE ADMINISTRATION**, select any **PENCIL ICON** to the right of a field



Home

Recipient

Appointments

Help & Information

DETAILS

RELATED

Change Vaccine Inventory

Change Recipient

Case Number

00111703

Account Name

[Clinic ABC Loc 1](#)

Contact Name

[VaccineAdmin Test](#)

Appointment Date/Time

1/13/2021, 2:18 PM

Cancellation Reason

Date and Time of Vaccination

1/13/2021, 2:18 PM

Adverse Reaction Consent

☒

Schedule Dose2 Followup Email

☐

Additional Information

Status

Closed

Date/Time Opened

1/13/2021, 2:05 PM

System Information

Created By

[Steve DiGangi](#), 1/13/2021, 2:05 PM

Vaccine Status

Dose 1 Administered

Vaccine

[Pfizer-BioNTech \(195 MDV\) COVID-19 Vaccine](#)

Vaccine Inventory

[Expiration 1/13/2021 8:30](#)

Injection Site

Left Deltoid

Route

Intramuscular (IM)

Administered By

[Steve DiGangi](#)

On Behalf of (Clinician)

Case Owner

[User16073838354179855083](#)

Notes

No notes to report.

Date/Time Closed

1/13/2021, 2:20 PM

Last Modified By

[Steve DiGangi](#), 1/13/2021, 2:20 PM

Audience

**Healthcare
Provider**

Healthcare Location Manager

Statewide Location Manager

Step 5 of 8: Edit Vaccine Administration Details

Case Number
00111703

Account Name
Clinic ABC Loc 1

Contact Name
VaccineAdmin Test

Appointment DateTime
Date: 1/13/2021 Time: 2:18 PM

Cancellation Reason
--None--

Date and Time of Vaccination
Date: 1/13/2021 Time: 2:18 PM

Adverse Reaction Consent
☒

Schedule Dose2 Followup Email
☐

Additional Information
*Status
Closed

Date/Time Opened
1/13/2021, 2:05 PM

System Information
Created By
Steve DiGangi, 1/13/2021, 2:05 PM

Vaccine Status
Dose 1 Administered

Vaccine
Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

Vaccine Inventory
Expiration 1/13/2021 8:30

Injection Site
Left Lower Forearm

Route
Subcutaneous (SQ)

Administered By
Search Contacts...

On Behalf of (Clinician)
Simon Couderc

Case Owner
User16073838354179855083

Notes
No notes to report.

Date/Time Closed
1/13/2021, 2:20 PM

Last Modified By
Steve DiGangi, 1/13/2021, 2:20 PM

Cancel Save

The **VACCINE ADMINISTRATION** details will now appear as editable fields. As you edit fields, they will highlight yellow to indicate that you've made a change.

1. Edit any of the following fields to the correct information:

- Date / Time of Vaccination
- Injection Site
- Route
- Administered By
- On Behalf of (Clinician)
- Notes

2. Do not edit any of the following fields:

- Account Name
- Cancellation Reason
- Appointment Date / Time
- Case Owner

3. Click **SAVE**

Audience

Healthcare
Provider

Healthcare
Location Manager


Statewide
Location Manager

Tips

From this screen, you cannot edit the **VACCINE INVENTORY**. To see how to edit Vaccine Inventory, look at the next slide.

Step 6 of 8: Change Vaccine Inventory

To edit the **VACCINE INVENTORY** field of the **VACCINE ADMINISTRATION**, you must select the **CHANGE VACCINE INVENTORY** button.



Home

Recipient

Appointments

Help & Information

DETAILS

RELATED

Case Number

00111703

Account Name

Clinic ABC Loc 1

Contact Name

VaccineAdmin Test

Appointment DateTime

1/13/2021, 2:18 PM

Cancellation Reason

Date and Time of Vaccination

1/13/2021, 2:18 PM

Vaccine Status

Dose 1 Administered

Vaccine

Pfizer-BioNTech (195 MDV) COVID-19 Vaccine

Vaccine Inventory

Expiration 1/13/2021 8:30

Injection Site

Left Deltoid

Route

Intramuscular (IM)

Administered By

Steve DiGangi

Change Vaccine Inventory

Change Recipient

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Review the next section of this User Guide for instructions on how to use the **CHANGE RECIPIENT** button.

Step 7 of 8: Select an Updated Vaccine Inventory

A pop-up window will appear inviting you to Change Vaccine Inventory.

- 1. Click the **SEARCH VACCINE INVENTORIES** field, which will populate a list of available inventories for your location
- 2. Locate and click the correct inventory, or type the name of the inventory to quickly find it

Note: You can not change the Vaccine Inventory from a two-dose vaccine product to a single-dose vaccine product if you are editing a **SECOND DOSE** vaccine administration

- 3. Click **FINISH**

Change Vaccine Inventory

Existing Vaccine Inventory:
Expiration 1/13/2021 8:30

Updated Vaccine Inventory Name:

Search Vaccine Inventories...

Case Number:
00111703

Account Name:
Clinic ABC Loc 1

Contact Name:
VaccineAdmin Test

Appointment Date/Time:
Jan 13, 2021, 2:18:25 PM

Cancel

Finish

Updated Vaccine Inventory Name:

Search Vaccine Inventories...

SomTestInventoryUAT3

Grace Pfizer Inventory

Expiration 1/13/2021 8:30

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

Although **VACCINE PRODUCT** is not an editable field, changing the **VACCINE INVENTORY** to an inventory of a different product will automatically update the **VACCINE PRODUCT** field.

Step 8 of 8: Review the Vaccine Administration Details Change History

Home

Recipient

Appointments

Help & Information

DETAILS

RELATED

Related Cases (0)

New

Case History (6+)

Date	Field	User	Original Value	New Value
1/28/2021, 9:52 ...	Vaccine Inventory	Steve DiGangi	Grace Pfizer Invent...	Expiration 1/13/20... ▼
1/28/2021, 9:52 ...	Vaccine Inventory	Steve DiGangi	Expiration 1/13/20...	Grace Pfizer Invent... ▼
1/27/2021, 3:28 ...	Administered By	Steve DiGangi	Steve DiGangi	▼
1/27/2021, 3:28 ...	Route	Steve DiGangi	Intramuscular (IM)	Subcutaneous (SQ) ▼
1/13/2021, 2:20 ...	Vaccine Inventory	Steve DiGangi		Expiration 1/13/20... ▼
1/13/2021, 2:20 ...	Status	Steve DiGangi	New	Closed ▼

View All

At any point, you can review the history of changes made to the Vaccine Administration details.

- 1. From the Appointment Record, click the **RELATED** tab
- 2. View **CASE HISTORY** to see the date, time, user, old value, and new value for each individual field that was changed

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Edit Vaccine Administration Recipient

Step 1 of 5: Navigate to Recipient Tab

When a **HEALTHCARE PROVIDER** enters Vaccine Administration details for the wrong **RECIPIENT**, the Healthcare Provider must change the recipient for the entered Vaccine Administration details.

To begin, navigate to the **RECIPIENT** tab.



Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Full name, ex: John Smith

Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

0 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produc...	Recipient Dose ...	Date of Admini...	Email	Inactive Reason
------------	-------------	-----------	---------------	--------	-------------------	--------------------	-------------------	-------	-----------------

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number	Vaccine Manufacturer Na...	Vaccination Administration D...
------------	-----------	---------------	--------	-------------	----------------------------	---------------------------------

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager


Tips

Healthcare Providers can only change Vaccine Administration recipient for recipients who received their COVID-19 vaccine through the same location as the Healthcare Provider.

Step 2 of 5: Locate Recipient

Clicking on the **RECIPIENT TAB** takes you to a screen to search all recipients in CVMS.

- 1. Type in the incorrect recipient's name in the search box
- 2. Click **SEARCH**
- 3. Select the recipient's name



Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex. John Smith) or email address and date of birth.

Q John Smith

✕

Q Email, John@j.com

Date of Birth (optional), MM/DD/YYYY

📅

Search


1 Recipients within CVMS

1 records found

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Produc...	Recipient Dose ...	Date of Admini...	Email	Inactive Reason
John		Smith	Jan 1, 2000	Male	Moderna (10 MDV) ...	Dose 2 Administered	Mar 17, 2021, 02:1...		

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager



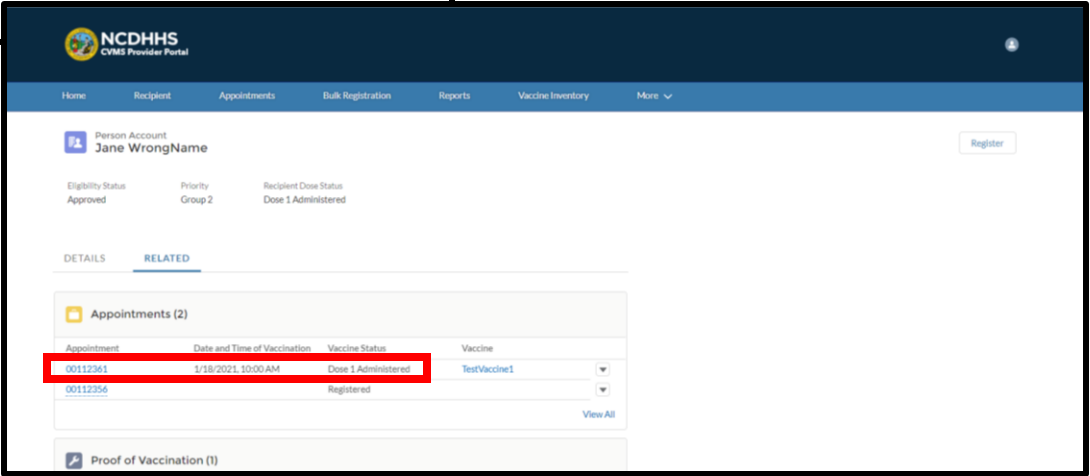
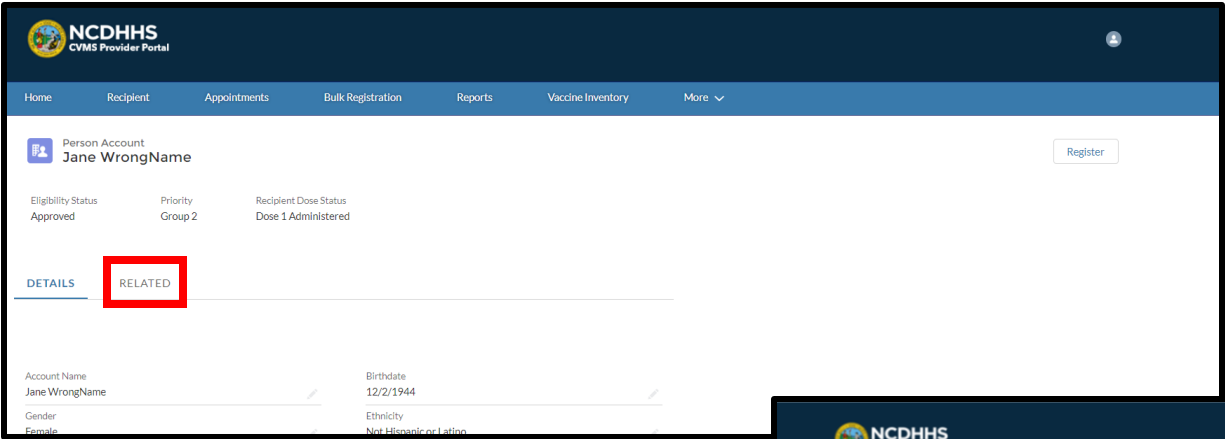
NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

36

Step 3 of 5: Locate Recipient Details

Clicking on the **RECIPIENT** name takes you to the account details of the recipient.

- 1. Click on the **RELATED** tab under the recipient's name to view appointment information
- 2. Select the appointment record that needs to be changed to another recipient (the **VACCINE STATUS** will say either **DOSE 1 ADMINISTERED** or **DOSE 2 ADMINISTERED**)



Audience

Healthcare
Provider


Healthcare
Location Manager

Statewide
Location Manager

Step 4 of 5: Change Recipient

Selecting the appointment record takes you to the appointment details screen.

Click **CHANGE RECIPIENT** in the top right corner to transfer the **VACCINE ADMINISTRATION** details to the correct recipient.



Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

More

DETAILS

RELATED

Case Number

00112361

Account Name

Clinic ABC Loc 1

Contact Name

Jane WrongName

Appointment DateTime

1/18/2021, 10:00 AM

Cancellation Reason

Date and Time of Vaccination

1/18/2021, 10:00 AM

Adverse Reaction Consent

☒

Schedule Dose2 Followup Email

☐

Vaccine Status

Dose 1 Administered

Vaccine

TestVaccine1

Vaccine Inventory

SomTestInventoryUAT3

Vaccine Dosage

First Dose

Injection Site

Left Deltoid

Route

Intramuscular (IM)

Administered By

Kaitlin Gates

On Behalf of (Clinician)

Steve DiGangi

Case Owner

User16073838354179855083

Additional Information

Status

Notes

Change Vaccine Inventory

Change Recipient

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Step 5 of 5: Locate Correct Recipient

A Change Recipient pop-up box will appear.

- 1. Search for the correct recipient in the **UPDATED CONTACT NAME** field
- 2. Click **FINISH**
- 3. A Success Confirmation pop-up should appear at the top of the screen
- 4. 3. A Success confirmation pop-up should appear at the top of the screen

Change Recipient

Existing Contact Name:
Jane WrongName

Updated Contact Name:

Jane RightName

×

Case Number :
00112361

Account Name:
Clinic ABC Loc 1

Vaccine Status:
Dose 1 Administered

Appointment Date/Time:
Jan 18, 2021, 10:00:00 AM

Cancel

Finish

NCDHHS
CVMS Provider Portal

Success!
Recipient Updated Successfully!

Home Recipient Appointments Bulk Registration Reports Vaccine Inventory More

DETAILS RELATED

Change Vaccine Inventory

Change Recipient

Case Number
00112361

Account Name
Clinic ABC Loc 1

Contact Name
Jane RightName

Appointment Date/Time
1/18/2021, 10:00 AM

Cancellation Reason

Date and Time of Vaccination

Vaccine Status
Dose 1 Administered

Vaccine
TestVaccine1

Vaccine Inventory
SomTestInventoryUAT3

Vaccine Dosage
First Dose

Injection Site
Left Deltoid

Route

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager

Tips

The status of the incorrect recipient will be reverted to their previous status, (e.g., ‘Dose 1 Administered’ will revert to ‘Registered’).

The correct recipient’s status will be updated to reflect the administered vaccine (e.g., updated from ‘Registered’ to ‘Dose 1 Administered’).

Post-Vaccine Administration Reminders

Post Vaccine Administration Reminders

After recipients received a first dose, they will receive **TWO (2) SECOND DOSAGE REMINDER NOTIFICATIONS** of the timing requirements for the second dosage:

1. The first reminder is **24 HOURS** after
2. The second is **ONE WEEK AFTER** the first dosage is administered.

They also will receive a **NOTIFICATION** informing you of your **PROOF OF VACCINATION**. This will be automatically generated for them.

NOTE: COVID-19 vaccination record cards should be provided to the recipient or their guardian after the recipient receives their COVID-19 vaccine.

The recipient can request you provide a completed vaccination record card with important information about the COVID-19 vaccine they received (i.e., vaccine manufacturer, lot number, date of first dose administration, and second dose due date).

You can also suggest that they take a picture of their vaccination record so they can remember the type of vaccine they received and their second dose due date.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager

Tips





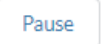
Learn more about viewing a recipient's Proof of Vaccination in the **CVMS Provider Portal Viewing Proof of Vaccination User Guide**.

Recipients who receive a **SINGLE-DOSE** product will not receive any second-dose notifications.

Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenow.services.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) browsers are not compatible with CVMS.

User Guide Change Log

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/18/2020	<ul style="list-style-type: none"> Added Patient Verification and Screening page, Removed mention of Adverse Reaction Annotation, clarified On Behalf Of (Clinician), added Schedule Follow-up Page Updated Process for recipients that are not Eligible yet / Not Approved 	9-18, 22	Steve DiGangi
2	1/10/2021	<ul style="list-style-type: none"> Removed any mention of the 2 CVMS Vaccine Support emails. Added CVMS Help Desk Portal information 	1, 2, 22	Courtney Seward
3	1/13/2021	<ul style="list-style-type: none"> Updated screenshots to include updated branding, Appointments tab, Second Dose warning label, and new Vaccine Route Included information about recipients who may receive a first dose outside of CVMS 	5, 9-11, 13-17, 21	Steve DiGangi
4	1/28/2021	<ul style="list-style-type: none"> Added Location Switcher button explanation section Added new section: Edit Vaccine Administration Details After Submission Added new section: Edit Vaccine Administration Recipient 	8-12, 23-31, 32-37	Steve DiGangi Kaitlin Gates
5	3/1/2021	<ul style="list-style-type: none"> Added information about single-dose products 	21, 22, 30, 39	Steve DiGangi
6	3/4/2021	<ul style="list-style-type: none"> Updated information regarding COVID-19 Vaccine Portal Removed eligibility branding to replace with Vaccine Group 	14, 41	Steve DiGangi
7	3/10/2021	<ul style="list-style-type: none"> Updated branding to include Recipient Check-In Tool Added Appointment Confirmation Number usage Added Book Second Dose Appointment section Created new section to cover scheduled appointments 	5, 6, 9, 10, 12, 14-17, 24-45	Steve DiGangi
8	3/15/2021	<ul style="list-style-type: none"> Split CVMS Scheduling sections into a guide addendum 	3, 5, 49	Jerilyn MacLaren-Hall
9	4/15/2021	<ul style="list-style-type: none"> Updated Screenshots to display new fields for HCP portal home page, appointments tab 	14, 15, 27, 28, 36,	Kaitlin Gates
10	5/6/2021	<ul style="list-style-type: none"> Removed Vaccine Group Slide from Appendix 		Steve DiGangi